Using the Protocol Submission Worksheet v4.1 (eform)

Quick Reference Guide

This guide provides instruction on using the electronic Protocol Submission Worksheet (PSW). If you have any questions regarding the PSW eform or the instruction included in this quick reference guide, please contact the NCI CTEP Help Desk by telephone (301) 840-8202, fax (301) 948-2242, or e-mail at: ncictephelp@ctep.nci.nih.gov

Accessing and Saving the PSW eform

The PSW eform is located on the CTEP Web site Forms page under the *Protocol Development and Assembly* heading at: http://ctep.cancer.gov/forms/index.html.

1. Click the download icon to open the eform. The PSW is displayed within MS Word with a default file name of Document#.doc.

The PSW eform is a MS Word template containing a **.dot** file extension. Once downloaded, the file automatically converts to a MS Word document containing a **.doc** file extension. You may continue to access the file in the above fashion or store the MS Word document file on your personal computer or LAN. You may also prefer to save multiple Word document files, one, for example, for each Principal Investigator in your organization. The Word files can be saved with fixed information (e.g., Investigator Number) to prevent duplicating the entry of this information each time the PSW is accessed.

2. Perform a **Save As** to save the PSW to your computer or LAN. Rename the file with a unique name following your organization's standard naming conventions.
3. You will need to enter information into each field and complete all relevant sections of the form.
4. Click the **Save** icon to save your file regularly and prevent losing any entered data.
5. Once you have completed the form, click **Close** from the **File** menu and click the **Yes** button to confirm that all changes are saved to the file.

Navigating the PSW eform

You will need to navigate within the PSW eform to insert information in the text fields or select checkboxes. To move from field to field, you can use the keyboard or the mouse depending on your preference:

If you want to…	then…
move forward from field to field	press the TAB KEY or click the mouse to place the cursor within field
move to the previous field	press the SHIFT + TAB KEYS or use the mouse

Note: The PSW is designed so that you access *only* the text fields and checkboxes; it does not allow access to other text within the form.

You may enter text in a field when it is highlighted in black, as shown in Figure 1.

Figure 1: Highlighted text field

You can enter a checkbox when the outline appears as a bold border, as shown in Figure 2.

Figure 2: Highlighted checkbox

Entering Information in the Text Fields

Almost all of the text fields in the PSW allow *free text* where any number of characters, numbers, and symbols can be entered. However, the PSW has few mechanisms to ensure data accuracy. You will need to validate that the information you have entered is accurate and free from errors.

Character Limitations

One method that the PSW employs to ensure accurate data entry, is to limit the number of characters that can be entered within a field when the value is known to have a fixed character length. For example, the **CTEP Institution Code** field, shown in Figure 3, is restricted to five characters.

Figure 3: Fixed character length

Field Expansion

The free text fields used within the PSW allow you to enter as many characters as needed. When typing, the text will wrap to the next line and the field will expand in height to accommodate the text. For example, the **Protocol Title** field, shown in Figure 4, has expanded to hold the second line of text.

Figure 4: Unlimited character length

Entering Checkboxes

You can select checkboxes by clicking them with the mouse, as shown in Figure 5, or by typing the letter 'X' from the keyboard.

Figure 5: Checking the checkbox

Correcting or Modifying Information

You can easily correct errors made within text fields using the same actions used in MS Word. Simply insert the cursor within the text and delete or add text as needed.

To remove a check from a checkbox, simply type the letter 'X' or click the checkbox a second time.

Getting Help

Each text field and checkbox within the PSW includes Help Text that briefly describes the information needed, character limitations, and other applicable information. To view the Help Text, select the text field or checkbox and then press the F1 KEY. The Help Text displays as shown in Figure 6.

Figure 6: Help Text

Click the **OK** button to return to the PSW eform.

Submitting the PSW

Once you have completed all relevant sections and have verified the accuracy of the information entered, you are ready to send the PSW to the Protocol and Information Office (PIO).

1. Attach the PSW file to your e-mail submission. You may choose to send the protocol as an attachment with the PSW or under separate cover, depending on the size of the files and your e-mail provider.
2. Address the e-mail to the PIO at: pio@ctep.nci.nih.gov and click **Send**.